

# U.S. Department of Housing & Urban Development

## Facilities Management News

*Office of Public Housing*

*Diana Armstrong, Director*



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Urban Development  
Office of Public Housing  
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Greetings again!

It seems like it was just last week that we published our first Facilities Management newsletter. And here we are again with the July '03 newsletter issue. We have received some favorable feedback. Again, let me remind you that if you have a concern or issue you wish for us to consider as a newsletter article, please let us know.

As we mentioned before, we have relocated from our old office on Dolorosa Street (across from Mi Tierra's restaurant). Our new downtown location is at the corner of South Saint Mary's and Commerce Street. We are located in the Alamo One Center building on the fifth floor. So next time, you are in town, please make plans stop in for a visit.

Please contact Margaret Sanchez, Tomas Romero, or Ruben Villanueva, Public Housing Facilities Management Specialists for technical assistance at (210) 475-6800 extensions 2213, 2247, or 2108.



**David G. Pohler**

Division Director

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## Is your Utility Allowance Schedule current?

24 CFR 982.517 states that *The PHA must maintain a utility allowance schedule for all tenant-paid utilities (except telephone), for cost of tenant-supplied refrigerators and ranges, and other tenant-paid housing services, e.g. trash collection (disposal of waste and refuse).* The same reference also states that *...utility allowance schedule must be determined based on the typical cost of utilities and services paid by energy-conservative households that occupy housing of similar size and type in the same locality. In developing the schedule, the PHA must use normal patterns of consumption for the community as a whole and current utility rates.*

More importantly, when is the utility allowance schedule reviewed and revised? The same reference states... *a PHA must review its schedule of utility allowances each year, and must revise its utility for a utility category if there has been a change of 10 percent or more in the utility rate since the last time the utility allowance schedule was revised.*

The utility categories are space heating, air conditioning, cooking, water heating, water, sewer, trash collection, other electric, refrigerator and range as mentioned above, and other specified housing services.

We have designed a Microsoft Excel spreadsheet that makes the utility allowance schedule much easier to manage and maintain. If you need the spreadsheet, we ask that you first check if you have the MS Excel program on your computer. Secondly, we need your current utility rates, to include fixed monthly charges/fees, as well as the tax rate percentage. Once this is done, we are prepared to better assist in preparing your own Utility Allowance schedule. The end result will be a schedule for the different type of housing units, e.g. single house, duplex, apartment, row house, and mobile home. All this, at no cost to you!

So back to the question – is your utility allowance schedule current? If the answer is a negative one or better --“I don’t know,” you might want to seriously consider taking advantage of this benefit.

## Environmental Review Comes First

The National Environmental Policy Act of 1970 (NEPA) established the policy for the protection of the environment. The intention is that paying attention to the environment improves the quality of what we are doing as well as the lives of the people that we are doing it for. This policy recognizes that a project/activity cannot only affect the environment, but the environment itself can impact a project/activity. Subsequent to the passing of the NEPA, many additional laws, authorities and executive orders have come into play.

All of the environmental laws ensure that environmental information is available before decisions are made and before actions are taken. All Federal agencies are required to follow this procedure. Although it may seem like an added nuisance, it can certainly save everyone time and money in the long run.

For HUD, there are two primary sets of regulations governing environmental compliance. 24 CFR Part 50 provides the guidance for environmental compliance for the use of HUD funds. Most projects conducted by Public Housing Authorities have an environmental review conducted by HUD staff under 24 CFR Part 50, typically with the assistance of the U.S. Army Corps of Engineers. 24 CFR Part 58 permits the role of units of general local government in meeting HUD’s environmental review requirements. Although not often employed, a unit of local government, which is deemed a Responsible Entity, can conduct an environmental review for a Public Housing

Authority project. This is typically arranged through an Intergovernmental Agreement (IGA) between the local government and the PHA. HUD is aware of almost 60 IGA's of this type around the country.



If you are interested in viewing a sample IGA, learning about environmental or energy training opportunities, or have questions regarding environmental, energy, or green building issues, please feel free to contact your Field

Environmental Officer, W. Laurence Doxsey, at 210-475-6882.

## Franzell Pankey Retires

Yes, after a ten-year career with our HUD Field Office, in the Public Housing division, Franzell has elected to retire. We know that he and his wife, Vivian plan to spend a great deal of time at their beautiful Medina Lake house. All of us here in Public Housing will miss him and wish both Franzell and Vivian our very best. We also want to congratulate Franzell on his distinctive and lengthy career with the federal government.

## Energy Audits...what does CFR state?

The purpose, according to the CFR, is to implement HUD policies in support of national energy conservation goals by requiring PHAs to conduct energy audits and undertake cost-effective energy conservation measures.

*All PHAs shall complete an energy audit for each PHA-owned project under management, not less than once every five years. The standards shall be the same as for state standards for energy audits. Energy audits shall analyze all of the energy conservation measures that are pertinent to the*

*type of buildings and equipment operated by the PHA.*

## Missing Photos:

We unintentionally omitted these two Public Housing staff photos from our last newsletter.



Margaret Sanchez



Tomas Romero

## PHAS Program important dates

### Management Assessment Certificate reporting schedule

Fiscal Year End Date	Submission Due Date	Late Presumptive Date
Sept. 30, 2001	Nov. 30, 2001	Feb. 28, 2002
Dec. 31, 2001	Feb. 28, 2002	May 31, 2002
Mar. 31, 2002	May 31, 2002	Aug. 31, 2002
Jun. 30, 2002	Aug. 31, 2002	Nov. 30, 2002
Sept. 30, 2002	Nov. 30, 2002	Feb. 28, 2003
Dec. 31, 2002	Feb. 28, 2003	May 31, 2003

### PHA Financial Reporting Schedule

FISCAL Year End	9/30	12/31	3/31	6/30
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<u>Unaudited Extension</u> Request Deadline	11/15	2/13	5/16	8/16
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<u>Unaudited Due Date</u>	11/30	2/28	5/31	8/31
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Due Dates do not include extensions late penalty: one point score deduction every 15 days submission is late with a maximum late penalty of five points.

<u>Audited Due Date</u>	6/30	9/30	12/31	3/31
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No extensions allowed for audited submissions

## Capital Fund Close-Out procedures

So you completed a modernization project funded by an annual grant and you have paid all authorized costs, what happens next? Here are the required documents you need to submit to our section:

- a. Three copies of Form HUD-53001, AMCC, and
- b. Two copies Annual Statement/ Performance and Evaluation Reports, marked "Final"

You are required to update eLOCCS on a monthly basis, until the grant is officially "Closed Subject to Audit."

## Customer Service Satisfaction Survey Calendar for FY2003 & FYE 6/30, remaining steps...

### Survey Process Start Day End Day

PHA survey results available in RASS	July 2	July 3
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PHA Certifies Follow-up Plan	July 3	July 17
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Resident Indicator Scores available in NASS	July 18	July 31
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## Some key points on Contract Bid Openings and Procurement

This is very similar to your Pre-Bid Conference; however, since money is at stake at this point, this may become very stressful. Here are some important key points to consider during your next bid opening.

- Ensure all bid submissions are sealed before acceptance

- Date/Time stamp and initial each bid, during acceptance
- Ensure your verbal statement remains consistent, as you open each and every bid
- After all bids are read, identify the lowest bid; however, remind all attendees that you must review all bids prior to declaring the lowest bidder as - responsible & responsive
  - Responsible: has the technical and financial capacity to secure the needed resources to deliver goods and services
  - Responsive: conforms exactly to the Invitation for Bids requirements
- Written minutes to all your bid and construction meetings are recommended
- Please offer to provide copies of the bid tabulation sheet for those that are interested

If you need assistance with a sample rejection or acceptance letter, please let us know. We can also help with helping you identify the necessary documentation that should be included in your project folders, or what documents should be included in your bid package.

Need a PHA procurement policy? Try the Texas Housing Authority's web site --  
<http://txtha.home.texas.net/PolSamp.html>

## Upcoming October Newsletter Topics:

- ❑ Section 8 Home Ownership Program
- ❑ Procurement and Contracts
- ❑ eLOCCS monthly obligations
- ❑ EH&S new reporting requirements